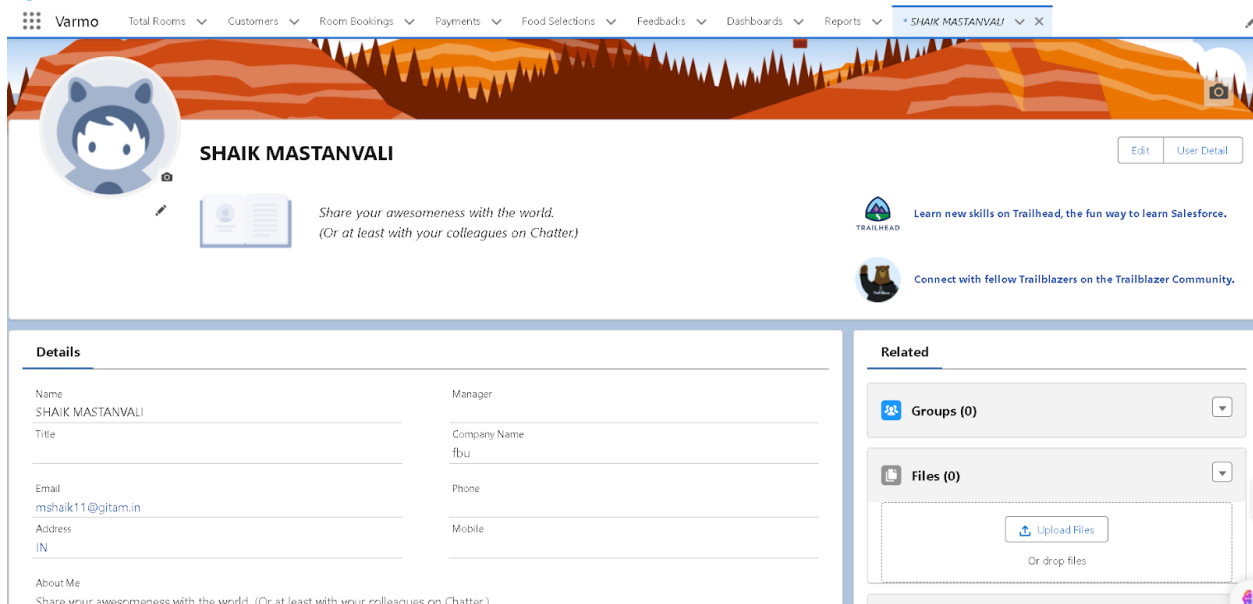


A CRM coating to Manage the Booking of Co-Living

Our co-living space project aims to create a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. We believe that living together in a shared environment fosters collaboration, reduces isolation, and enhances the overall quality of life.



What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects?

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Payment1	Payment1__c	Custom Object		03/10/2024	✓
Total Room	Total_Rooms__c	Custom Object		28/07/2024	✓
Feedback	Feedback__c	Custom Object		28/07/2024	✓
Food Selection	Food_Selection__c	Custom Object		28/07/2024	✓
Room Booking	Room_Booking__c	Custom Object		28/07/2024	✓
Customer1	Customer1__c	Custom Object		28/07/2024	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			

What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visual force Tabs

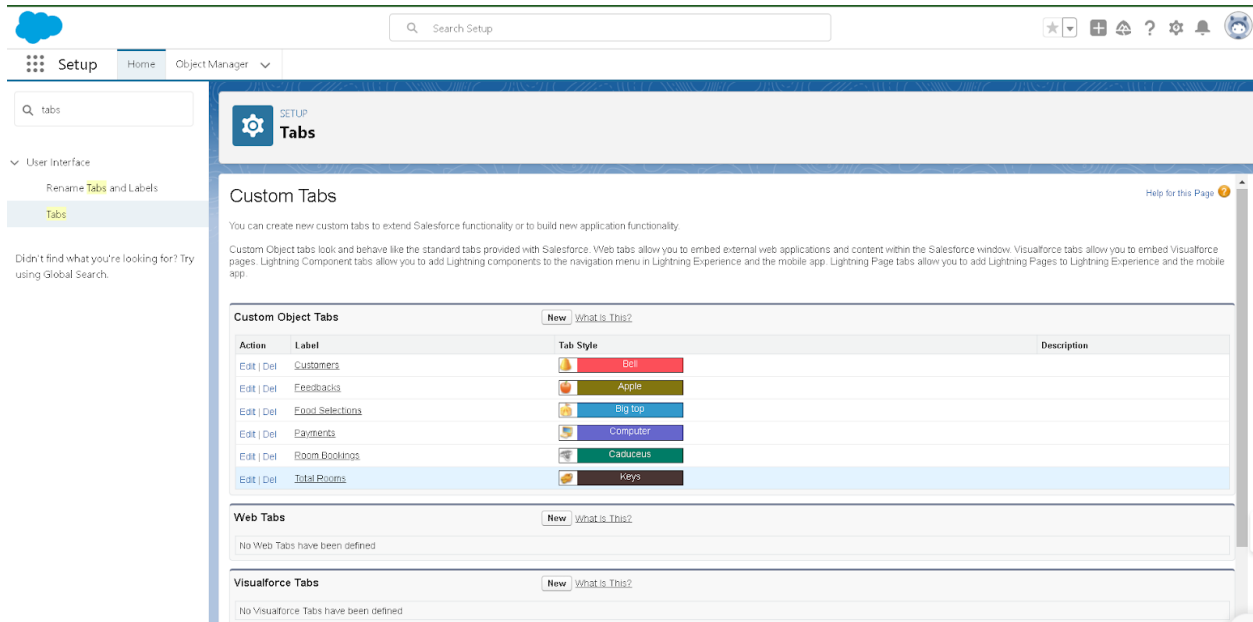
Visual force Tabs are custom tabs that display a Visual force page. Visual force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

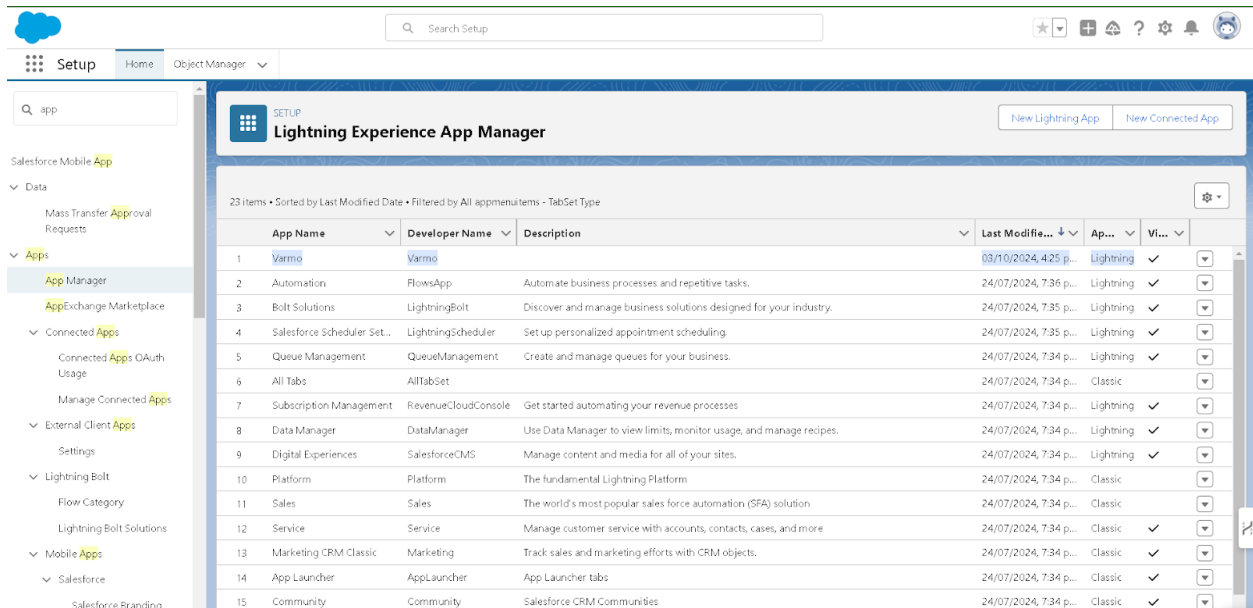


The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your organization can work

more efficiently by easily switching between apps.



When we talk about Salesforce, Fields represent the data stored in the columns of a

relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

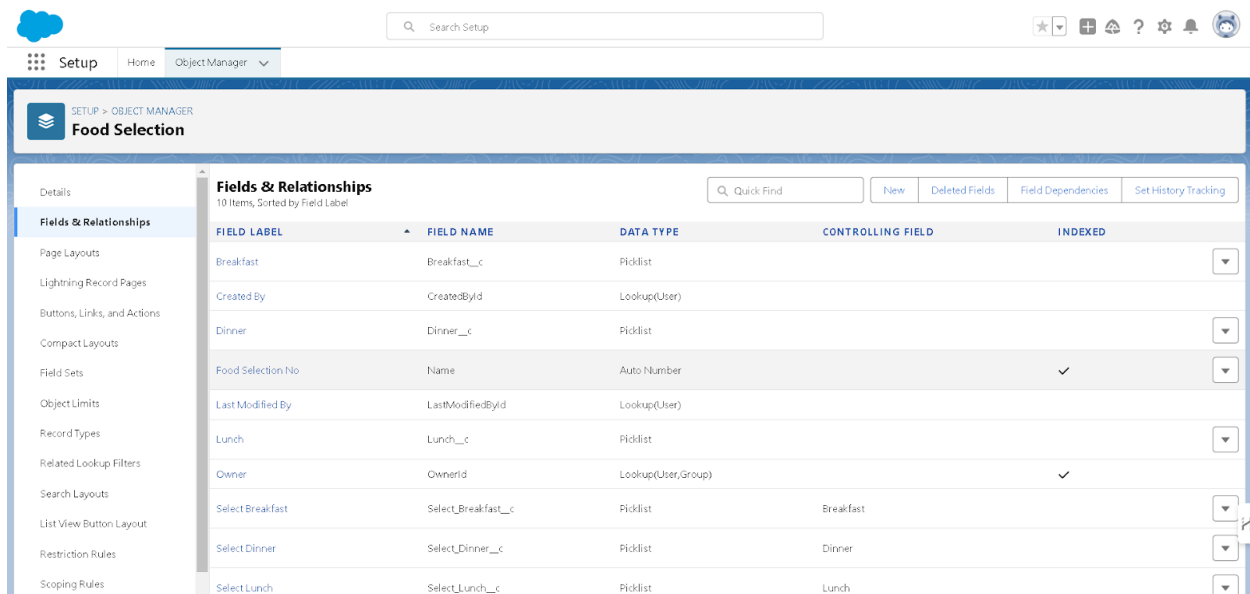
1. Standard Fields

2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

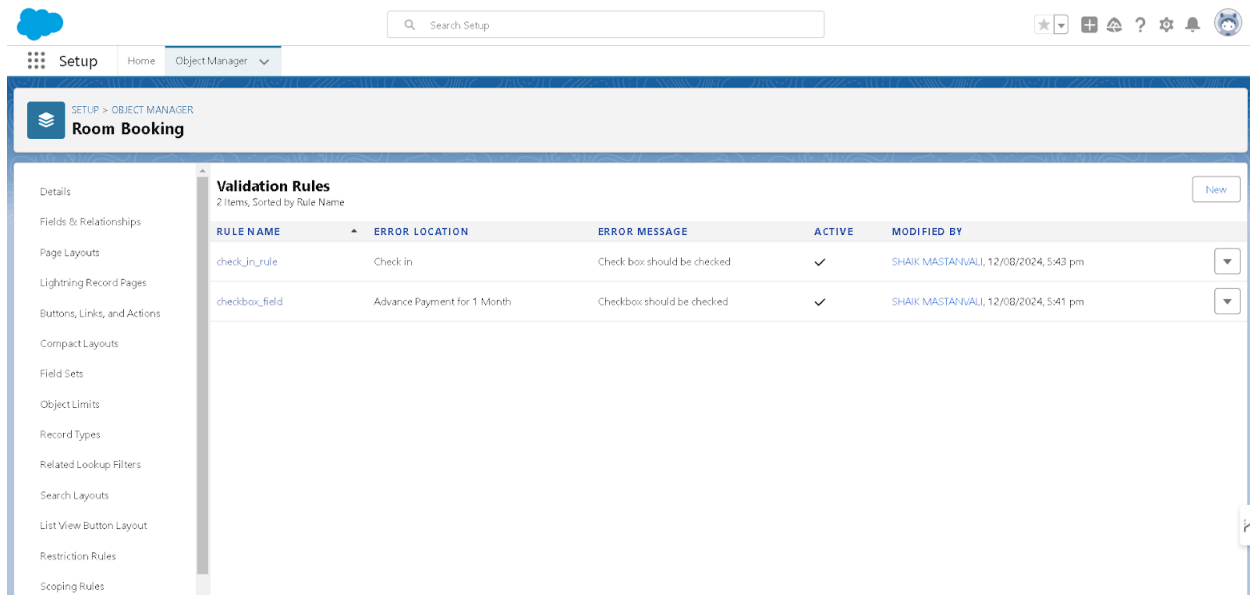


The screenshot displays the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the Setup menu with options like Home, Object Manager, and a search bar. The main content area is titled 'Food Selection' and shows the 'Fields & Relationships' section. This section contains a table with 10 items, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The items listed are: Breakfast, Created By, Dinner, Food Selection No, Last Modified By, Lunch, Owner, Select Breakfast, Select Dinner, and Select Lunch.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select Dinner	Select_Dinner__c	Picklist	Dinner	
Select Lunch	Select_Lunch__c	Picklist	Lunch	

Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.



A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example, System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default, salesforce provides below- standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard

objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned to that particular one.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered and a list of items including 'Profiles'. The main content area is titled 'Profiles' and shows a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The following table represents the data shown in the screenshot:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit Del ...	Custom platform User1	Salesforce Platform	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Edit Del ...	Custom platform User2	Salesforce Platform	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Edit Del ...	Custom User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>

Roles

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: [Territory-based Sample](#)

Executive Staff
CEO, President, CFO, VP, Sales
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of other Executive Staff

Western Sales Director
Director of W. Sales
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of users above or at same level

Eastern Sales Director
Director of E. Sales
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of users above or at same level

International Sales Director
Director of Int Sales
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of users above or at same level

Western Sales Rep
CA Sales Rep, OR Sales Rep

Eastern Sales Rep
NY Sales Rep, MA Sales Rep

International Sales Rep
Asian Sales Rep, European Sales Rep

[Set Up Roles](#)

☐ Don't show this page again

Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) [Edit | Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter000dm0000scruuae.0yphricvqgq@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	qararati_Ashish	qarara	mshak12@test.in	Marketing	✓	Custom platform User1
<input type="checkbox"/> Edit	gelli_Ganesh	gelli	mshak13@test.in	Recruitment	✓	Custom platform User2
<input type="checkbox"/> Edit	guja_sandeep	sgujj	mshak11@test.in	CEO	✓	Custom User
<input type="checkbox"/> Edit	MASTANUJULI_SHAIK	SMASST	mshak11@infinity.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@000dm000008cruuae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsscurity@000dm000008cruuae.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

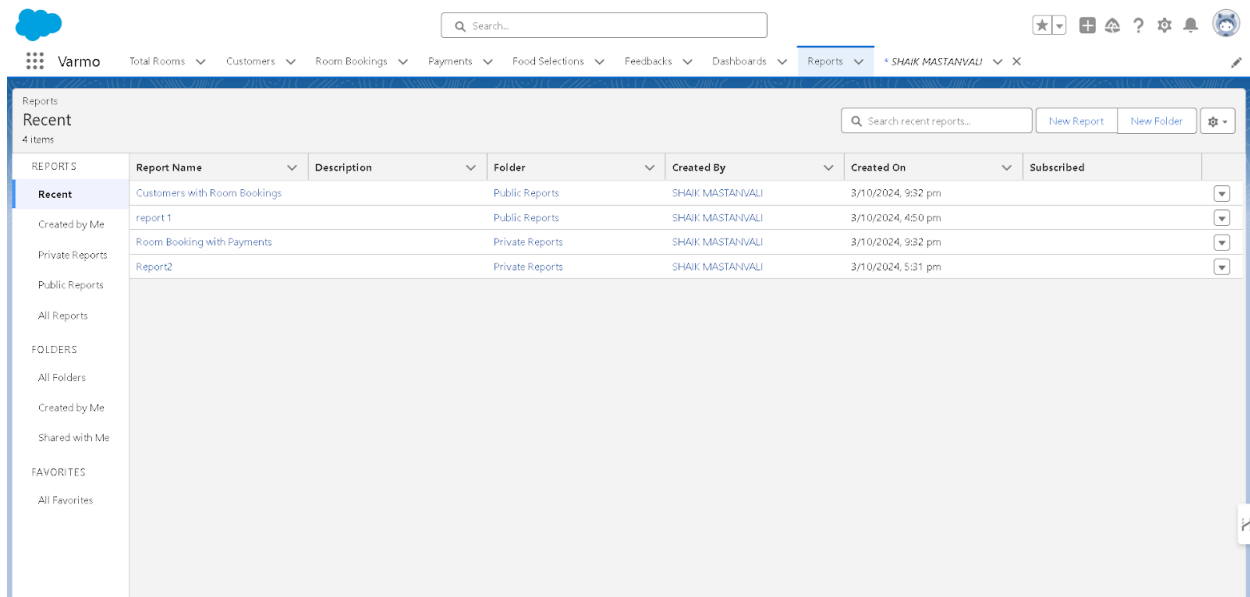
Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the

resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

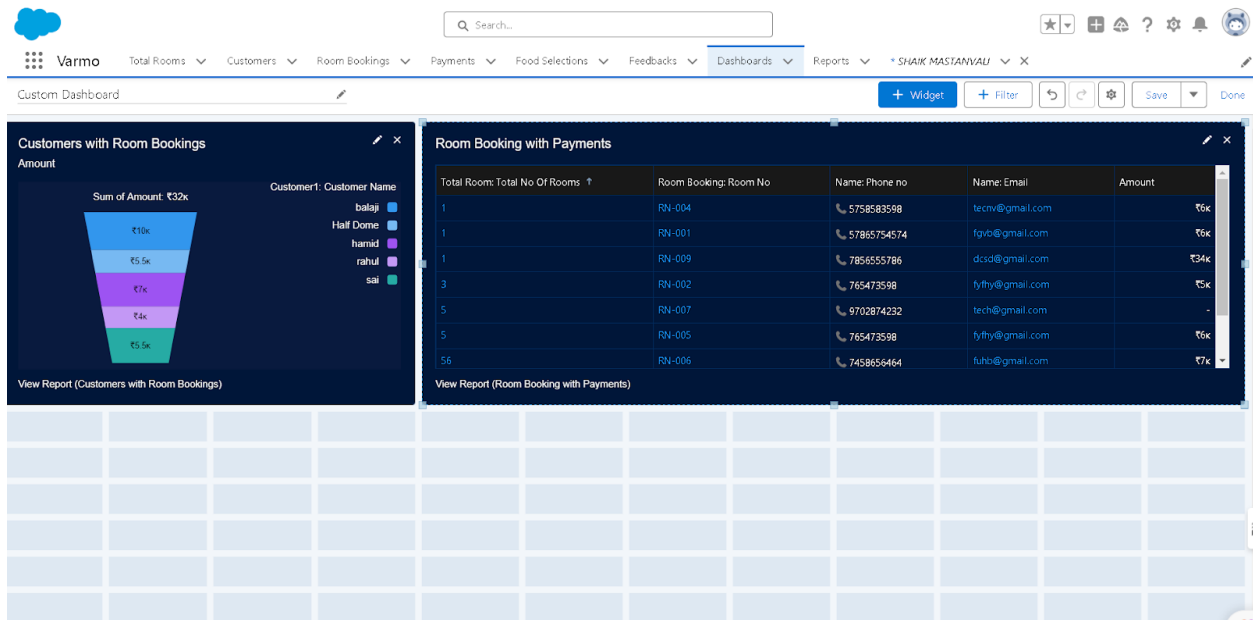
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports



Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.



Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

To get the Amount Field automatically by the selection of the Room sharing and Ac fields, the Amount is generated Automatically in the amount field.

Flow Testing

